

Herding Cats: Managing with Electronic Documents

Part 1 – Electronic File Management



How a better organized computer and email in-box can
help you save time, money and **paper**

In this first module in the **Managing Electronic Documents** series, we examine **Windows Explorer**, your computer's filing cabinet. You will learn how to use Explorer to create, copy, move and edit folders and files. Additional tips are also given on creating shortcuts and accessing shared drive materials.

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PaperCuts Campaign

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Introduction

11,000 is the approximate number of City of Seattle employees (regular, part-time, intern and temp)

- If everyone prints just one email a day...
 - 11,000 sheets x 5 = 55,000 sheets a week
 - 55,000 x 52 weeks = 2,860,000 sheets a year
 - That's 5720 reams. This is more paper than the Legislative Dept., Personnel, and the Dept. of Neighborhoods **combined**.
- Bottom-line: If everyone can print **one less page** per day, the City will save nearly **3 million** sheets – that's more than 1.5 Space Needles! (953 ft. to be exact)

What are bytes?

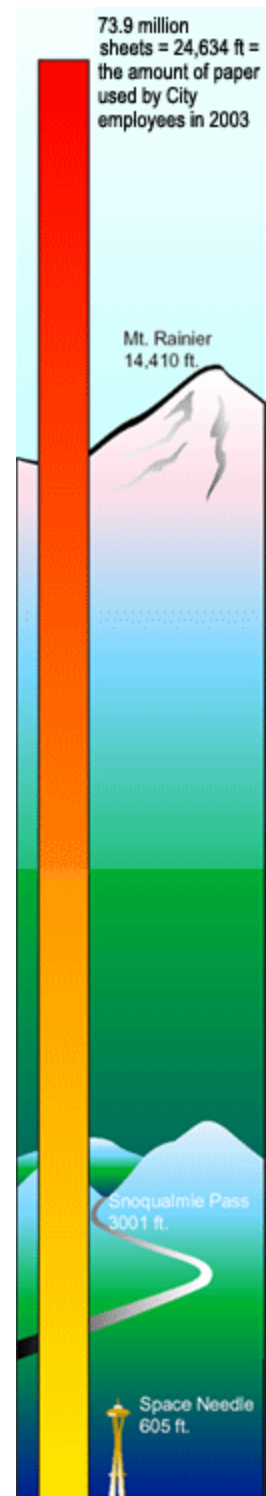
Computer files (e.g. mydocument.doc; myspreadsheet.xls, etc.) and applications (Word, Excel, even Windows XP operating system) are measured in terms of **bytes**. First there were kilobytes, then megabytes and now gigabytes and terabytes. Each unit is roughly 1,000 of the unit below it, but not quite. Here's how it breaks down:

1 kilobyte (KB) = 1,024 bytes
1 megabyte (MB) = 1,024 kilobytes (1,048,576 bytes)
1 gigabyte (GB) = 1,024 megabytes (1,048,576 kilobytes)

Real life examples:

How Many Bytes for Anything (from [the University of California at Berkeley](http://www.eecs.berkeley.edu/~cs161/units/units.html))

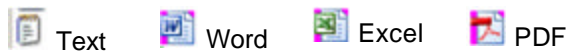
Information object	How many bytes
A binary decision	1 bit
A single text character	1 byte
A typical text word	10 bytes
A typewritten page	2 kilobyte s (KB s)
A low-resolution photograph	100 kilobytes
A short novel	1 megabyte (MB)
The contents of a 3.5 inch floppy disk	1.44 megabytes
A high-resolution photograph	2 megabytes
The complete works of Shakespeare	5 megabytes
A minute of high-fidelity sound	10 megabytes
One meter (or close to a yard) of shelved books	100 megabytes
The contents of a CD-ROM	500 megabytes
The contents of a DVD	17 gigabytes
A collection of the works of Beethoven	20 gigabytes
A library floor of academic journals	100 gigabytes
50,000 trees made into paper and printed	1 terabyte (TB)



Electronic Documents

An electronic document is any document that can be created, stored, manipulated or accessed electronically. Examples of electronic documents include:

- **Text/Office documents** (small; usually under 250 KB)



- **Images or photos** (medium size; 200 KB – 2500 KB; usually under 5 MB)



- **Audio or Video** (large; upwards of 10- 50 MB)



BENEFITS

- [Can be] Easier and quicker to find
- [Can be] Easier to send
- Readily portable, easy to save
 - Flash drives/Thumb drives/portable storage
 - CDs or DVDs
- Saves trees and water resources
- **Uses Less Paper**

iPods can also store data (this one 30GB)



Thumb drive;
Flash Drive;
Key Drive

PITFALLS

- Hard to find
- Hard to read
- Formatting issues
- Storage issues
- Can print poorly



Herding Cats: Managing Electronic Documents

Part 1 – Electronic File Management

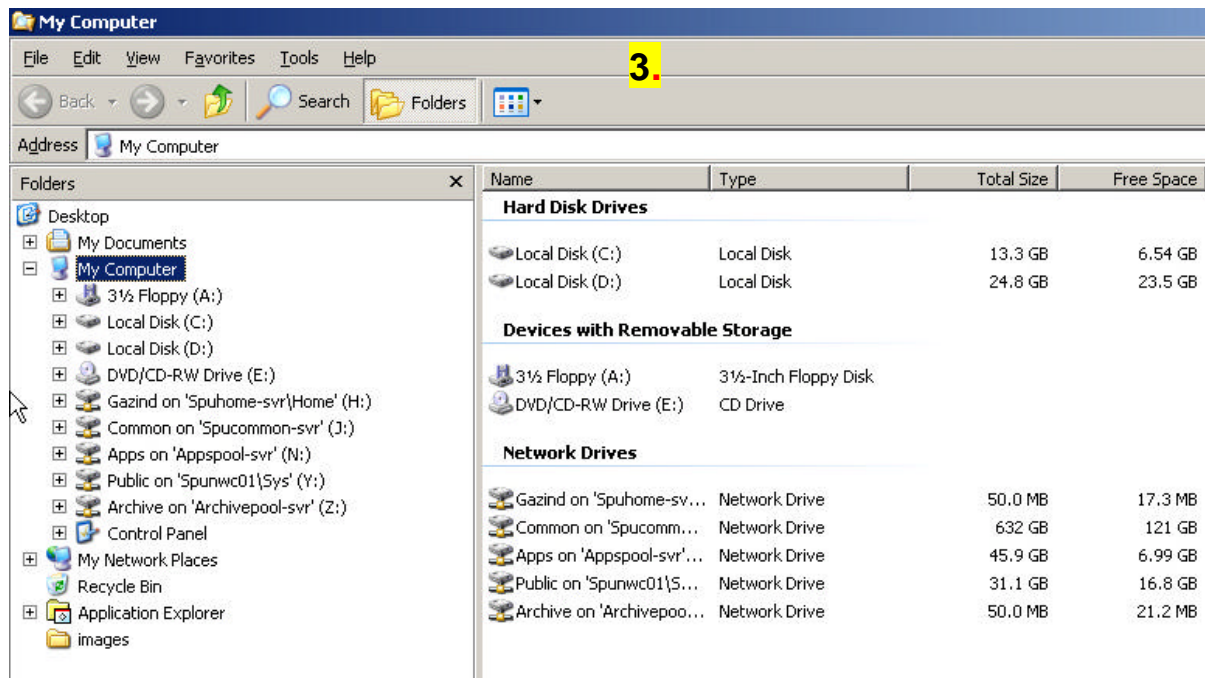
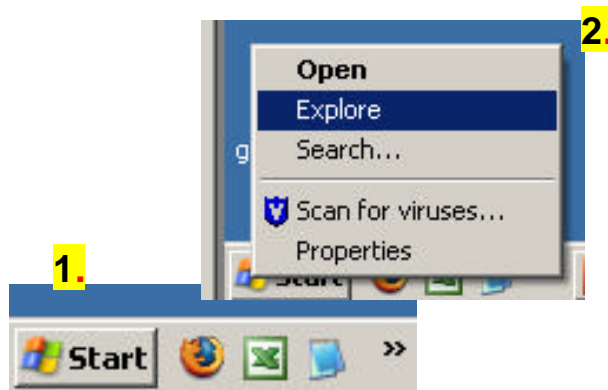
Windows Explorer

Windows Explorer is an application that is part of modern versions of the [Microsoft Windows operating system](#) that provides a [graphical user interface](#) for accessing the [file systems](#). In layman's terms: *Windows Explorer is your computer's filing cabinet.*

Source: http://en.wikipedia.org/wiki/Windows_Explorer

OPENING WINDOWS EXPLORER

1. **Right** click on the Start Menu in the lower left of your computer's toolbar
2. Select **Explore**
3. The next screen you see is **Windows Explorer (My Computer)**



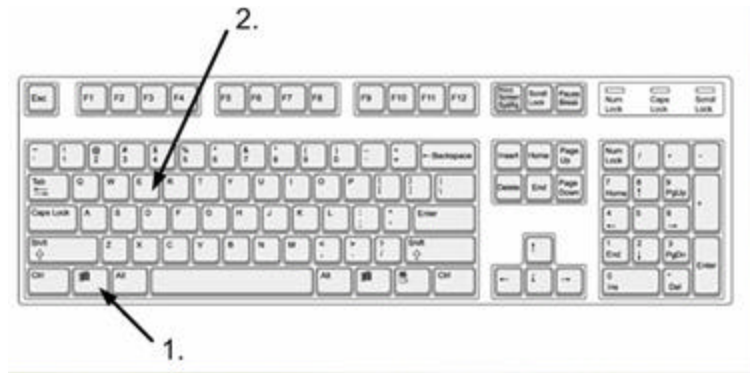
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Keyboard shortcut

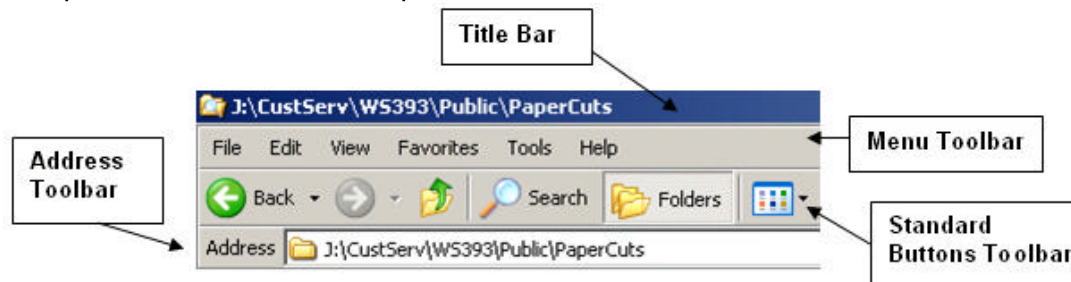
To quickly open Windows Explorer from any application, simply hold down the windows key (next to the Ctrl key) and press + E

Shortcut: WINKEY + E



TOOLBARS

Sample shot from Windows Explorer toolbar

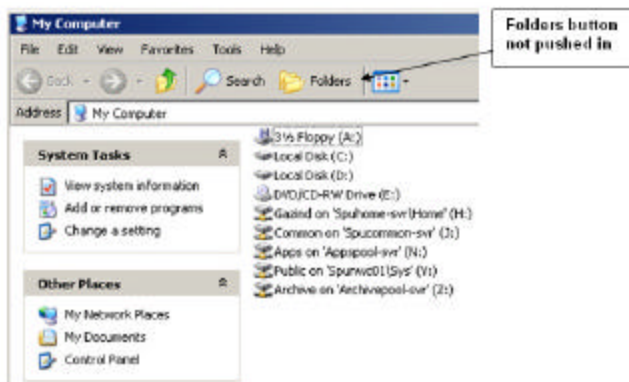


Helpful tip! Instead of sending a co-worker a copy of the document you are working on; send the **address** of the location instead! Just cut and paste the location from Windows Explorer into the text of your email. Create one more backslash and then type in the document name.
Example: <J:\CustServ\WS393\Public\PaperCuts\myreport.doc>

FOLDER BUTTON

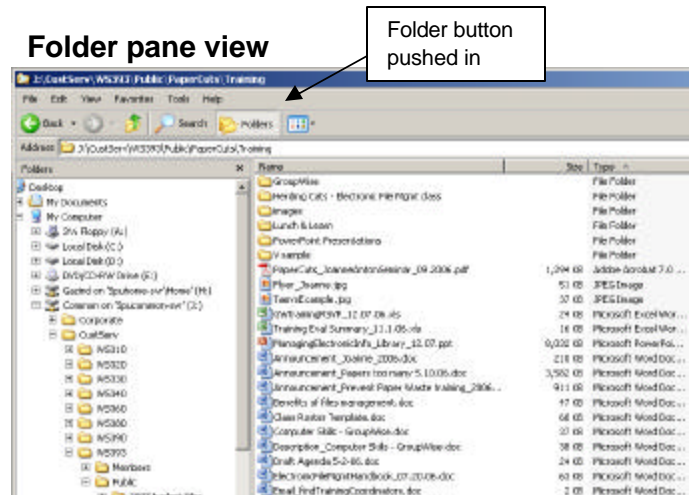
The folder button in the Windows Explorer Toolbar enables you to view your files and folders from two different view points:

Windows Default view



This is the Windows XP default view – although the grey boxes on the left will change depending on where you are in your hierarchy.

Folder pane view

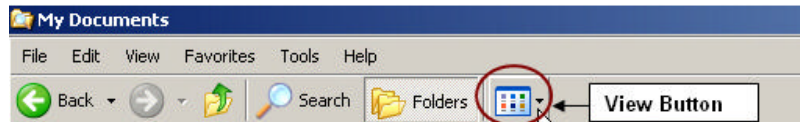


By clicking on the folders button, you now have the ability to view both the detail view (individual files) on the right, as well as the "big picture" on the left.

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FOLDER VIEWS



You can view your folders and files in several different formats. Clicking on the **view button** next to **Folders** offers several choices

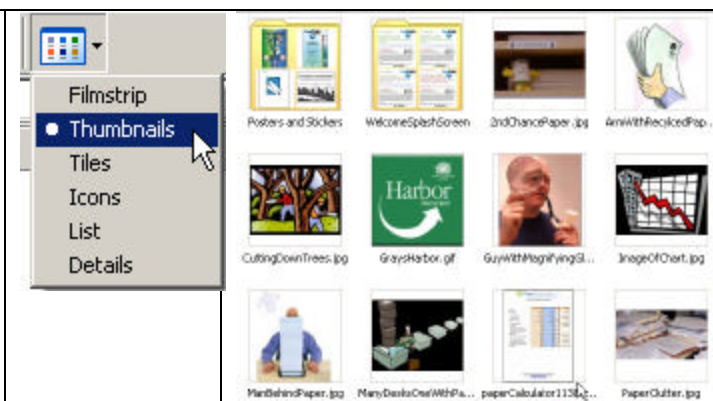
<div>Details View</div> <ul style="list-style-type: none">Shows additional information (size, type, date, etc.)Sortable by header (A-Z or Z-A)Can add additional categories (see Adding Columns)	<div><div><div></div><div>Filmstrip</div><div>Thumbnails</div><div>Tiles</div><div>Icons</div><div>List</div><div>Details</div></div></div>	<div><table><thead><tr><th>Name</th><th>Size</th><th>Type</th><th>Date Modified</th></tr></thead><tbody><tr><td>2004</td><td></td><td>File Folder</td><td>6/27/2006 5:58 PM</td></tr><tr><td>2005</td><td></td><td>File Folder</td><td>6/27/2006 5:58 PM</td></tr><tr><td>2006</td><td></td><td>File Folder</td><td>6/27/2006 6:11 PM</td></tr><tr><td>Paper Calculator</td><td></td><td>File Folder</td><td>9/6/2006 3:00 PM</td></tr><tr><td>AVG_vs_ACT_Explanation_04.25.2006.doc</td><td>20 KB</td><td>Microsoft Word Doc...</td><td>4/25/2006 6:11 PM</td></tr><tr><td>benefits based on M Cox 2004 data.xls</td><td>27 KB</td><td>Microsoft Excel Wor...</td><td>1/30/2006 9:52 AM</td></tr><tr><td>Big Improvement Scenario_claudia.xls</td><td>48 KB</td><td>Microsoft Excel Wor...</td><td>7/26/2006 5:53 PM</td></tr><tr><td>City Seattle 2001-2006 Paper use history...</td><td>14 KB</td><td>Microsoft Excel Wor...</td><td>8/23/2006 3:08 PM</td></tr><tr><td>DPD-063006.xls</td><td>31 KB</td><td>Microsoft Excel Wor...</td><td>7/11/2006 4:21 PM</td></tr><tr><td>evaluation template.doc</td><td>21 KB</td><td>Microsoft Word Doc...</td><td>3/28/2006 1:46 PM</td></tr><tr><td>JAD Findings_2003.doc</td><td>110 KB</td><td>Microsoft Word Doc...</td><td>4/2/2003 11:27 AM</td></tr><tr><td>Metro Duplexing Study_2006.pdf</td><td>529 KB</td><td>Adobe Acrobat 7.0 ...</td><td>3/27/2006 7:04 PM</td></tr><tr><td>PaperCuts Env Benefits 2005.B.doc</td><td>29 KB</td><td>Microsoft Word Doc...</td><td>3/8/2006 4:51 PM</td></tr></tbody></table></div>	Name	Size	Type	Date Modified	2004		File Folder	6/27/2006 5:58 PM	2005		File Folder	6/27/2006 5:58 PM	2006		File Folder	6/27/2006 6:11 PM	Paper Calculator		File Folder	9/6/2006 3:00 PM	AVG_vs_ACT_Explanation_04.25.2006.doc	20 KB	Microsoft Word Doc...	4/25/2006 6:11 PM	benefits based on M Cox 2004 data.xls	27 KB	Microsoft Excel Wor...	1/30/2006 9:52 AM	Big Improvement Scenario_claudia.xls	48 KB	Microsoft Excel Wor...	7/26/2006 5:53 PM	City Seattle 2001-2006 Paper use history...	14 KB	Microsoft Excel Wor...	8/23/2006 3:08 PM	DPD-063006.xls	31 KB	Microsoft Excel Wor...	7/11/2006 4:21 PM	evaluation template.doc	21 KB	Microsoft Word Doc...	3/28/2006 1:46 PM	JAD Findings_2003.doc	110 KB	Microsoft Word Doc...	4/2/2003 11:27 AM	Metro Duplexing Study_2006.pdf	529 KB	Adobe Acrobat 7.0 ...	3/27/2006 7:04 PM	PaperCuts Env Benefits 2005.B.doc	29 KB	Microsoft Word Doc...	3/8/2006 4:51 PM
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Thumbnail View

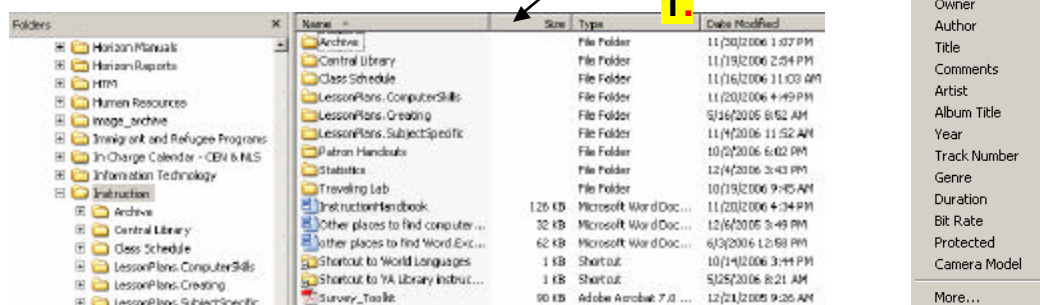
- Shows image of graphic or photo
- Mouse rollover shows folder size and file name



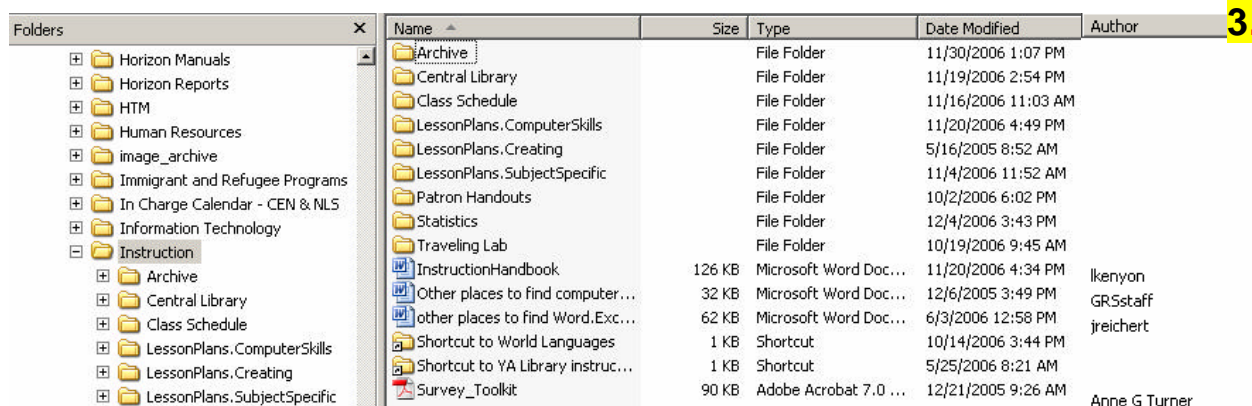
ADDING COLUMNS

It's easy to add additional columns to the **Detail View**.

- Place cursor on grey header bar (the one with **name, size, etc.**) and right click
- Select new header
- Hit Enter



New Column added! (Author)



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Adding Author

The Author header on the previous page is derived from your application itself – you don't need to do anything.

Example:



DIRECTORY AND FOLDER STRUCTURE

Location

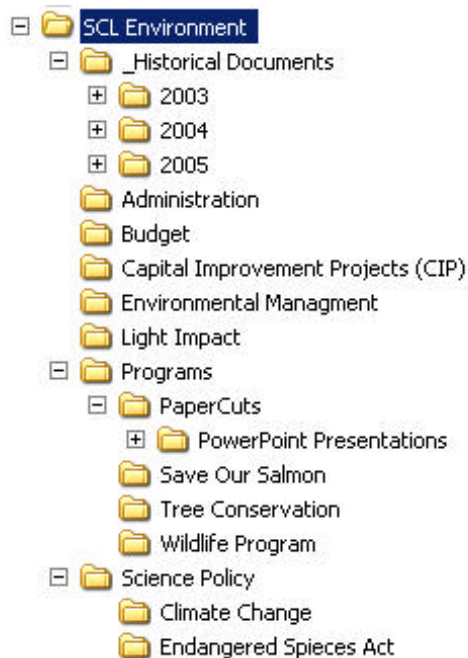
- Think paper filing cabinet
- Logical and organized
- Top folder should be main subject
- Lower level folders used to sub-divide the one above
- Little to no duplication

Name

- Organized alphabetically (default)
 - Underscore before A
- Easily understood/ deciphered by others (and yourself if viewed later)
- Length should be no more than two words – short is good!

Use of Capitalization and abbreviations

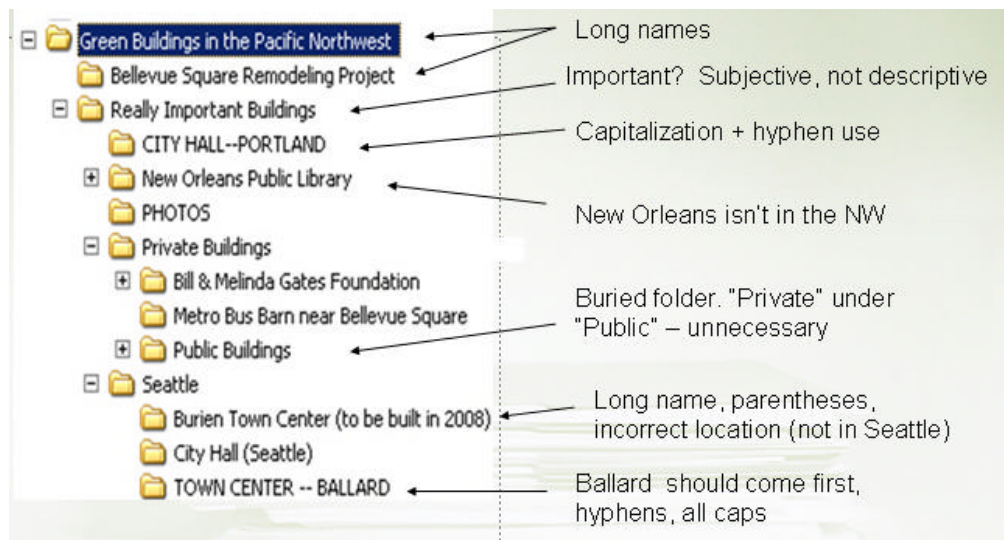
- Be consistent
- Don't use too many acronyms or abbreviations if shared by others



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Part 1 – Electronic File Management

Hierarchy Example



Naming Folders

Not So Good

- Green Buildings in the Pacific Northwest
- Burien Town Center (to be built in 2008)
- CITY HALL--PORTLAND
- City Hall (Seattle)
- Really Important Buildings

Better

- Green Buildings
 - Burien Town Center
 - Portland City Hall
 - Seattle City Hall
 - City Halls
 - Portland
 - Seattle
- OR

No folder needed – move any files in this folder to other more aptly named ones

EXAMPLE

Before

- Green Buildings in the Pacific Northwest
 - Bellevue Square Remodeling Project
- Really Important Buildings
 - CITY HALL--PORTLAND
 - New Orleans Public Library
 - PHOTOS
- Private Buildings
 - Bill & Melinda Gates Foundation
 - Metro Bus Barn near Bellevue Square
- Public Buildings
 - Public Buildings
- Seattle
 - Burien Town Center (to be built in 2008)
 - City Hall (Seattle)
 - TOWN CENTER -- BALLARD

After


- Green Buildings
 - Northwest
 - Oregon
 - Portland
 - Washington
 - Bellevue
 - Burien
 - Seattle
 - Ballard Town Center
 - Seattle City Hall
- Southeast

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Part 1 – Electronic File Management

Naming Files

- Choose a name that is easily recognizable
- Include date created or modified
Really important!
- A word on spacing
 - You can use spaces when naming files, but the Internet (browsers) doesn't like it. I'm partial to the underscore.
- Start general and add on specific details
- Use consistent modifiers and capitalization
 - _ Underscore
 - . Period
 - Hyphen

 Sign In Sheet.doc

 CouncilMinutes_082206.doc

 CouncilMinutes_08.22.06.doc

 PaperUseReport_OSE_08.15.06.xls

Doc Name	Department	Date
----------	------------	------

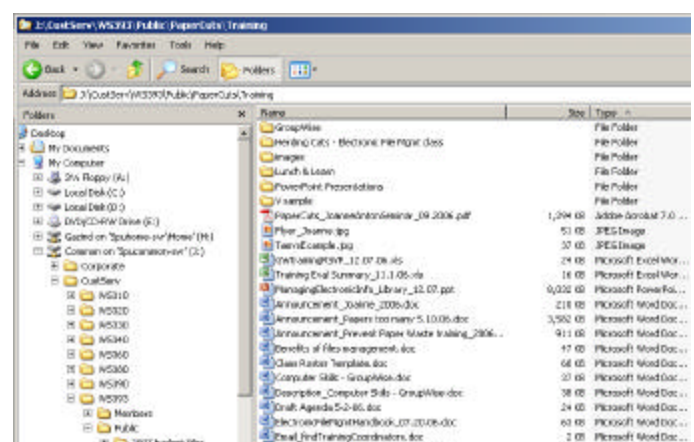
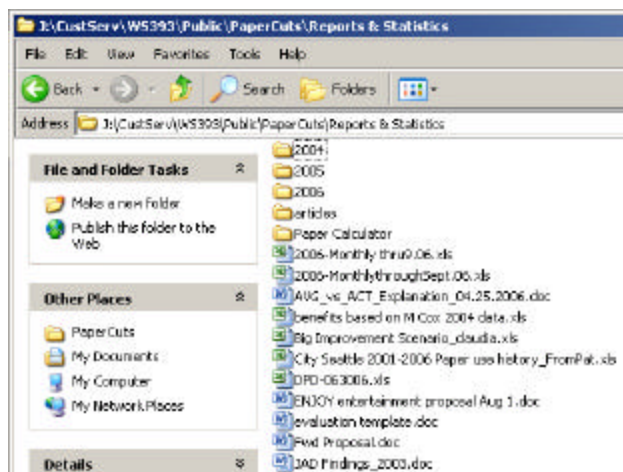
MOVING, RENAMING AND SHORTCUTS

Moving Files

Moving files in Windows Explorer is a snap!

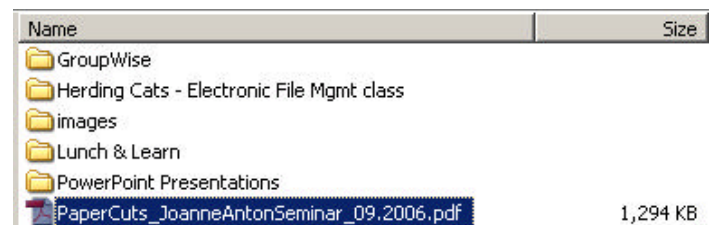
1. Open Windows Explorer
(shortcut WINKEY + E)

2. Click on the Folders button to create two panes
(I prefer to select file/folder from right pane and drag to left, but there are several ways to do it)



3. Select the file you wish moved (highlight)

4. Drag file to new home (Hold down left mouse button and move to new location)



5. Drop!

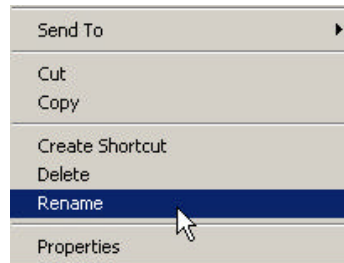
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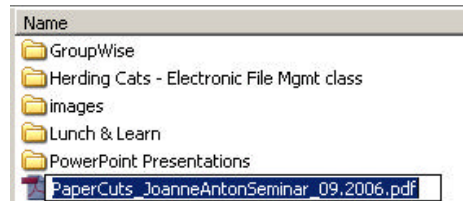
Renaming Files

There are several different ways to rename a file in Windows Explorer

1. Right click and select **Rename**



2. Click once, wait a moment and click again – the name box is now editable

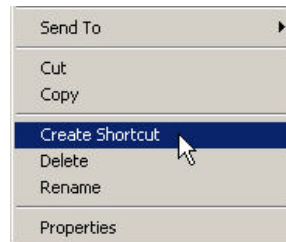


3. Keyboard shortcut – F2

Highlight file or folder and click on F2

Creating Shortcuts

1. In Right pane:
Right click on file or folder
2. Select **Create Shortcut**



3. Shortcut created at bottom of list

You'll know it's a shortcut if you are in **Detail View** as the word "shortcut" will show up under **Type**

Drag to new location

Name	Size	Type
Agenda10.31.06.doc	22 KB	Microsoft Word Doc...
Agenda 5.16. 06.doc	23 KB	Microsoft Word Doc...
Agenda 11.14.06.doc	21 KB	Microsoft Word Doc...
Agenda Steering Comm 8.8.06.DOC	69 KB	Microsoft Word Doc...
Agenda_08.08.06_v2.ppt	1,540 KB	Microsoft PowerPoi...
Shortcut to Agenda_08.08.06_v2.ppt	1 KB	Shortcut

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Dena's Shortcut

- Create **shortcut** to the shared folder you use most frequently and place on desktop
 1. Open Windows Explorer
 2. Right click on folder you want to create shortcut
 3. Select "Send to Desktop"
- Now, when you need to save/find a file (especially useful from GroupWise), click on Desktop first, and now your shortcut



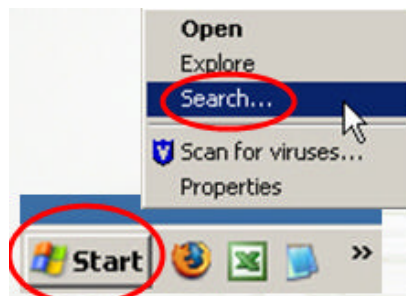
Windows XP Search

Virtually anything you save on your computer can be found. The tricky part is how you search for it.

ACCESSING THE SEARCH SCREEN

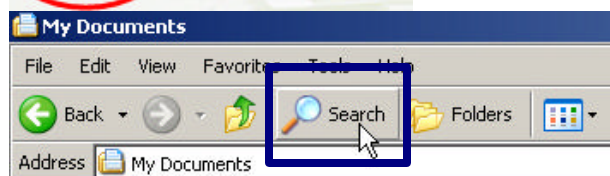
From Desktop

- **Right** click on the Start Menu in the lower left of your computer's toolbar
- Select **Search**
- The next screen you see is **Windows Explorer Search Screen**



From Windows Explorer

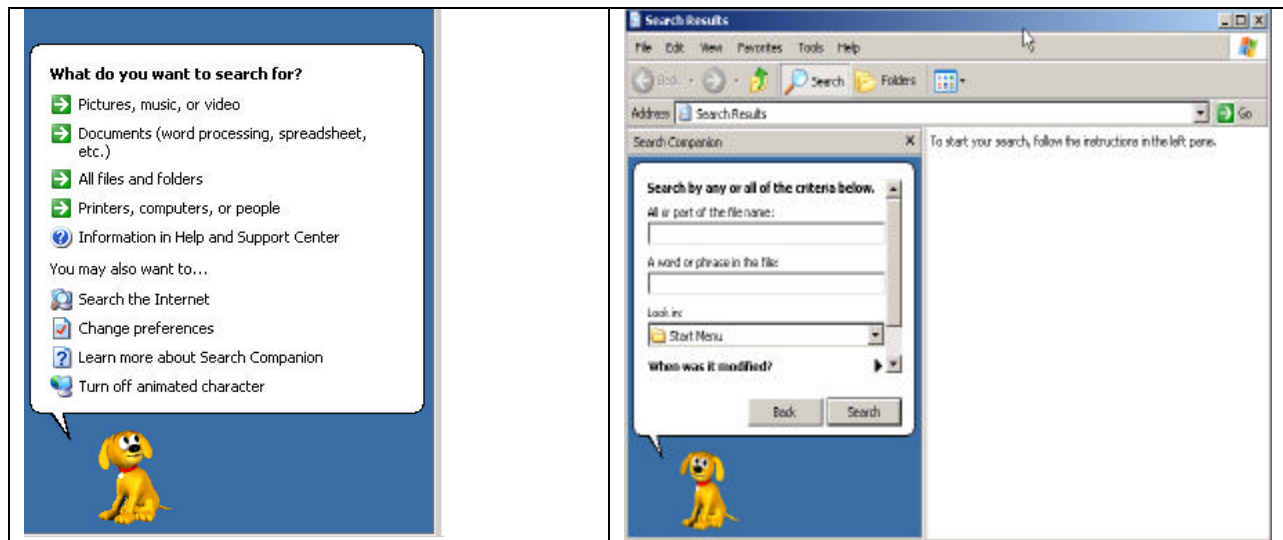
- Click on the Search button
- CTRL + F



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You'll now see one of two different search screens



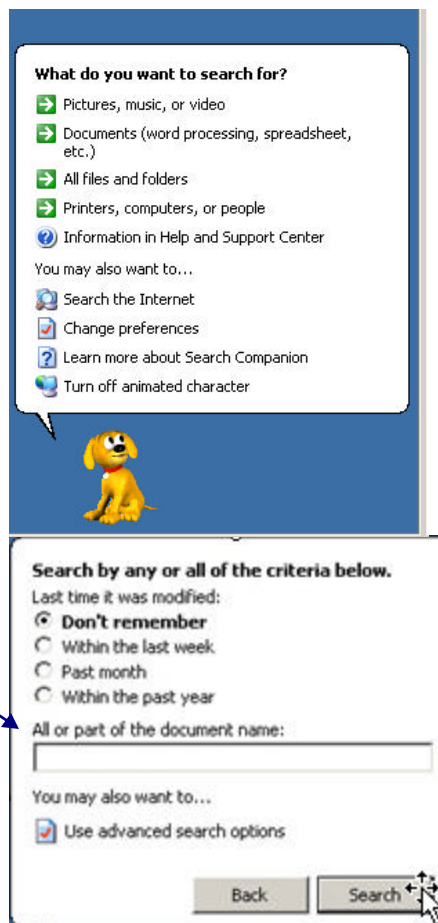
Searching For Files

1. Select search category

For the most part office workers use **Documents** or **All Files and Folders**

2. Select criteria

- Date
- Document Name



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3. Advanced Options

- Word or phrase in document

Date modified and All or part of the document name the same

Word or phrase in document is powerful, but *can* take a considerable amount of time. Try to limit the search with **Last date modified** or **size**.

Search by any or all of the criteria below.

Last time it was modified: ▼

☒ Don't remember

☐ Within the last week

☐ Past month

☐ Within the past year

All or part of the document name:

A word or phrase in the document:

Look in:

Gazind on 'Spuhome-svr\Home' (H:) ▼

What size is it? ►

More advanced options ►

Back Search

- What size is it?

Easy way to speed up the search process. If you know the file is very small or very large, here's where you can



What size is it? ▼

☒ Don't remember

☐ Small (less than 100 KB)

☐ Medium (less than 1 MB)

☐ Large (more than 1 MB)

☐ Specify size (in KB)

at least 0

More advanced options ►

Back Search

- Directory

If you know your file is in a particular drive letter, you can select it here to limit your search. If you don't select a specific drive, Windows will search all of them.

My Documents

My Pictures

My Music

My Videos

Desktop

My Computer

Local Hard Drives (C:,D:)

3½ Floppy (A:)

Local Disk (C:)

Local Disk (D:)

DVD/CD-RW Drive (E:)

KINGSTON (F:)

Gazind on 'Spuhome-svr\Home' (H:)

Common on 'Spucommon-svr' (J:)

Apps on 'Appspool-svr' (N:)

Public on 'Spunwc01\Sys' (Y:)

Archive on 'Archivepool-svr' (Z:)

Gazind on 'Spuhome-svr\Home' (H:) ▼

What size is it? ►

More advanced options ►

Back Search

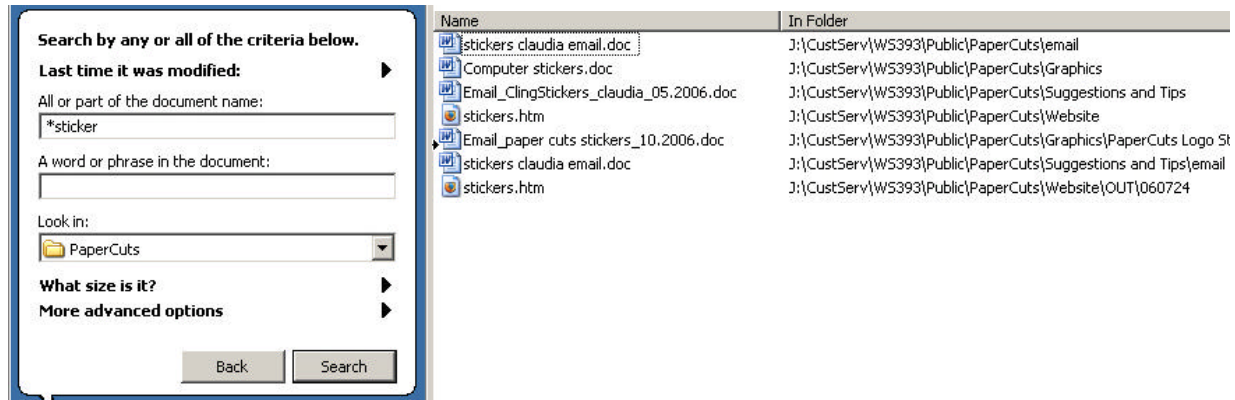
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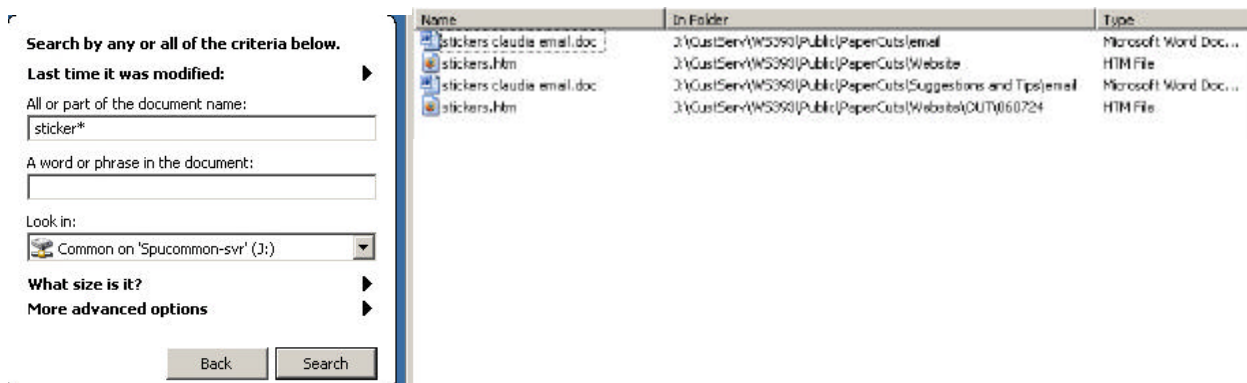
Wildcards:

The asterisk (*) acts as a wildcard when searching for files or folders

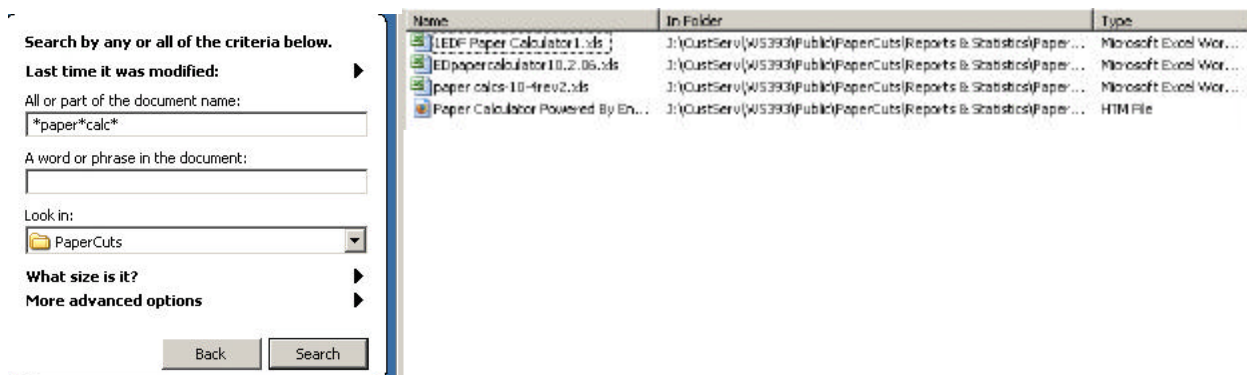
- ***sticker** (returns all files with sticker anywhere in the title). This yields the same search results as just plain “sticker”



- **sticker*** (this says show all files that **start** with the word ‘sticker’).



- ***paper*calc*** (this returns everything with “paper” or “calc” anywhere in title)



Windows Explorer Recap

- Save files right the first time so you can find them the next time
 - Saves time!
 - Confidence in your file management means less dependence on paper “crutches”
 - Decreases the likelihood of multiple copies in multiple directories under multiple titles
- Improved folder and file naming means both you *and* your co-workers can easily find documents
- Strategic use of shortcuts
- Anything you put in Windows Explorer is searchable!

